

Exhibit A Attachment A-1
Elements of Energy Upgrade California Program

- One-stop clearinghouse for alternative financing; pooled demand, competitive bidding for participation by lenders
 - Unsecured financing (examples)
 - Pennsylvania Keystone Help
 - ViewTech (NYSERDA)
 - Local banks
 - Secured financing (examples)
 - HUD Title I
 - Home Equity Line of Credit (HELOC)
 - PACE
 - Buildings outside scope of FHFA Guidance (commercial, multi-family, property values higher than FHFA scope)
 - Reconstituted PACE program (DOE PACE Pilot)
 - Comply with DOE Policy Framework for PACE Financing Programs and program procedures for DOE/FHFA pilot program
 - Possible administration of or integration with a statewide loan loss reserve program if funding is identified (contingency provision in contract)
 - Independent financial and legal consultation and support to the Commission for establishing alternative financing approaches
- Statewide web portal and branding - accomplish statewide branding consistent with Energy Upgrade California and use web portal throughout the state to reduce consumer confusion and integrate the ARRA SEP financing programs for municipalities with the rebate programs offered by the utilities as well as, other energy retrofit incentive programs and tax credits.
- Regional priority for program delivery - prioritization consistent with regional goals and policies; regional steering committees to achieve program success and maintain local commitment/identity with the program; piloting to encourage innovation/targeting: income levels, building types, workforce development, targeted ethnic community outreach.
- Contractor Credentials – Promote maximum BPI accreditation of contractor companies and BPI certification of contractor employees; verify that building permits are pulled and Title 24 requirements for alterations are met.
- Quality Assurance – Verify proper installation via HERS rater test-out (consistent with DOE Policy Framework for PACE Financing Programs); provide rebate for HERS rater verification; include net cost of verification/rating beyond rebate in financing; work with local real estate industry and multiple listing services to make rating and retrofit information available to the market.
- Participant Recruitment/Outreach – Conduct marketing, outreach and communication to promote maximum participation and provide full services to consumers; conduct in collaboration with Energy Upgrade California and web portal; outreach to contractors to encourage participation and explain program

- Workforce development – Collaborate with Clean Energy Training Program to support local training programs for skills necessary to succeed as building performance contractors (BPCs) or home energy raters; rebates for projects that use training program graduates; scholarships for HERS raters or BPCs
- Loading order - Requirement to invest in energy efficiency before PVs
 - 10% energy savings through energy efficiency pre-requisite – currently available 3 options – do 1, 2 OR 3 below:
 1. Prescriptive package (install all measures at time of retrofit) OR
 2. HERS II audit/rating OR
 3. Interim performance approach until HERS II is available
 - If 10% cannot be achieved – new option – do 1 AND 2 below:
 1. HERS II California Energy Audit and install all of the following measures that have not already been done (meet Commission technical specs):
 - Air sealing
 - Attic insulation
 - Duct test and seal or replacement
 - Insulation of domestic hot water or replacement
 - Combustion Safety Verification (BPI Analyst)
 - CO Alarm, AND
 2. Install other measures found by the HERS II energy audit to be more cost effective than PVs up to 10% savings
 - Provide rebates/financing for HERS II Energy Audit
- Multi-family – Collaborate with efforts around the state to extend HERS II energy audit, verification and rating procedures to multi-family buildings; Use existing energy audit approaches until HERS II multi-family available; conduct benchmarking; meet loading order using tools approved by Commission
- Commercial – Use existing energy audit approaches as approved by the Commission; conduct benchmarking; provide incentives for retro-commissioning; meet loading order requirements using tools approved by the Commission; financing for permanently installed 402 targeted measures must be included
- Leverage – Identify and make consumers/participants aware of all sources of leverage that could be applied to retrofit projects, including rebates for HERS energy audits/verifications/ratings, utility rebates, federal tax credits/deductions, privately available rebates/discounts, HUD program incentives, and other financing; financing only for the net cost of project after all other incentives
- Sustainability – Establish an explicit plan and implementation process for program to be self-sustaining after ARRA funding is no longer available; establish specific milestones and monitor progress against this plan; conduct risk analysis and implement specific actions to address risk that program will not sustain itself
- Verification of energy savings and data collection, tracking and reporting